

Add a document

When you are editing a page, you can upload a document to your Document library and then link to it from your page in one series of steps.

Note: To upload a document to a Document library when you are not editing a page (that is, as a separate task), see **Instructions for using the document library**.

The following exercise shows you how to upload a document to a SharePoint library and create a link to the document link on your page while you are editing the page.

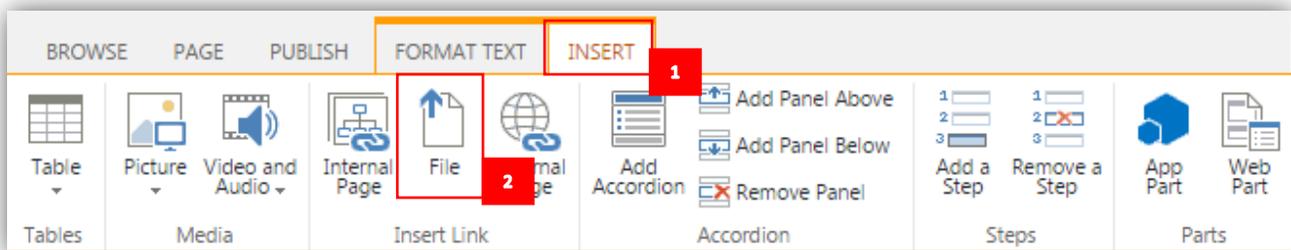
Upload the document to SharePoint

Before you upload your document to the SharePoint library, make sure you have saved it with a short, descriptive web-friendly file name (see Page Design > Documents for more help).

1. Navigate to the page you are editing.

Note: Different sections have different libraries, so it is important to be on the page in the section where you want to add the document.

2. Type the name of the document link as you want it to appear on your page and select it.
3. Click INSERT on the ribbon and select File.



4. You will be presented with the Documents library for your section. Any files already in the Documents library will be listed. Be sure you are in the correct Documents library by checking the left-hand library list (or the Current Location line). If you are not in the correct library, navigate to the correct library in the left-hand library.
5. Once you are in the correct library, click “add” to add a new document to the library.

Select an Asset

Current Location: boardbriefs at <http://wstage13.healthbc.org/sites/phsa-training/Documents/boardbriefs>

The screenshot shows a document management interface with a left-hand navigation pane and a main content area. The navigation pane lists various folders, with 'Documents' and its sub-folder 'boardbriefs' highlighted by a green box and a red '1'. The main content area displays a table of documents under the heading 'All Documents'. A red box highlights a 'Click to add new item' link, with a red '2' next to it. The table lists several documents with their names, modification dates, and authors.

Name	Modified	Modified By	Checked Out To
EWI_Project_Status_Report__15052014_-_doc	December 01, 2014	Chang, Tony	
MCMS Quick-Reference-Guide.pdf	January 28	Giroux, Karen	
PHSA-training-Nov 12 (1).ppt	November 12, 2014	Chang, Tony	
PHSA-training-Nov 12.ppt	November 12, 2014	Chang, Tony	
PHSA-training-Oct27.ppt	November 12, 2014	Chang, Tony	

6. In the pop-up window, click Choose File to navigate (in Windows Explorer) to the document you want to upload.

The screenshot shows a dialog box titled 'Add a document'. It has a 'Choose a file' section with a 'Choose File' button and a text box containing 'No file chosen'. Below this is a checked checkbox labeled 'Add as a new version to existing files'. There is a large text area for 'Version Comments'. At the bottom right, there are 'OK' and 'Cancel' buttons.

7. In Windows Explorer, select the document and click Open.

8. The Documents popup for your document will appear.

Documents - patient-guidebook.pdf

EDIT

Save Cancel Paste Copy Delete Item

Commit Clipboard Actions

The document was uploaded successfully. Use this form to update the properties of the document.

Name * patient-guidebook .pdf

Title Guidebook for Patients

Resource Category Patient Handout

ResourceType

Resource Description A complete guide for patients to the Vancouver Centre location of the BC Cancer Agency.

Resource Language

Audience

Health Professionals

Patients and Families

Physicians

Researchers

Version: 1.0

Created at 20/05/2016 1:15 PM by theresa.best@phsa.ca

Last modified at 20/05/2016 1:15 PM by theresa.best@phsa.ca

Save Cancel

The Document popup is the metadata record; it helps search engines find your content. Fill in the fields as follows:

Name – this field will show with the file name already in the field. If the file name is not the name you want, you must resave your document under the correct file name and re-upload it to SharePoint. If you change the file name in the Documents metadata popup you will create an error

Title – the full name of the document

Resource Category – click the little flag to the right of the field. When the Select Resource Category popup appears, navigate to the tag that describes your document, select it, and click OK.

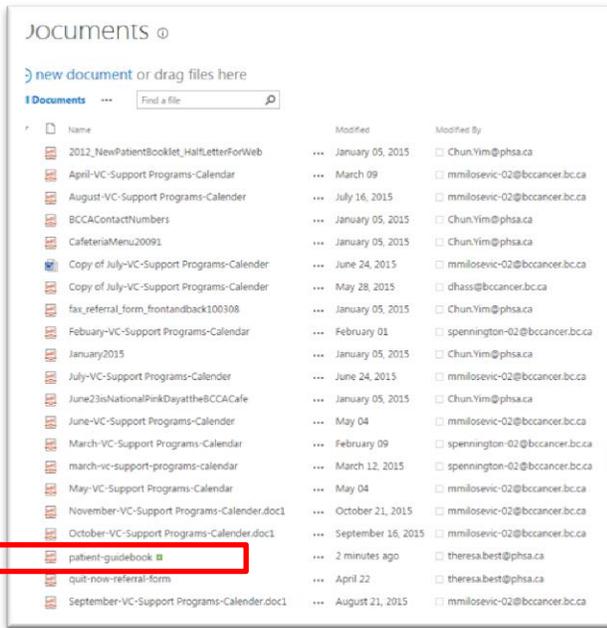
ResourceType – this tag is being developed

Resource Description – add a brief sentence describing the content of the document

Resource Language – ignore this if the document is in English; if it is not in English, select the language of the document from the drop-down list

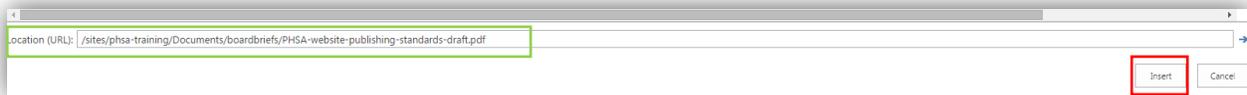
Audience – select the audience for the document (who it is written for)

9. Click Save. The Documents library for your page will appear, with your document added and a “new” icon beside it. Documents are added by file name in alphabetical order.



Link to the document from your page & add alt text

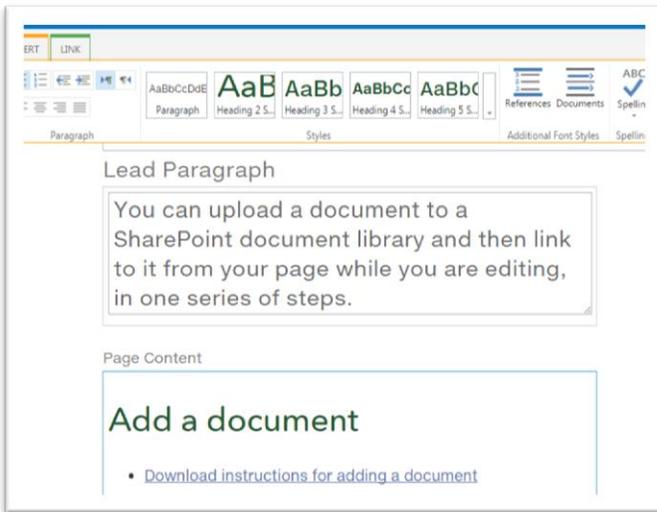
1. Once you have uploaded the document to SharePoint, you can add it to your page. Select the document file name and click Insert.



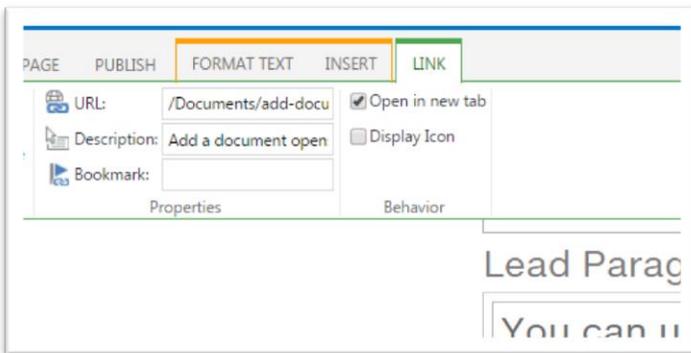
2. The text on your page now links to the document.



3. Add alt text to your document. Alt text is an important component of editing a website. Screen readers use alt text to tell visitors with disabilities what's on the page; it also helps search engines find items. Put your cursor on the document link you just added. You will see that the green Link tab appears.



4. Select the Link tab. The Link Properties box will appear. The URL of the document will already be in the URL field.
5. In the Description field, add the title of the document as well as the phrase “opens in a new window”. For example, if the name of the document is “Add a new document”, the Description field should read: “Add a document opens in a new window”.
6. Tick the **Open in a new tab** box. (All documents and external links should open in a new window.)



7. Click Save to save your page. The Description field text will appear as a popup on the webpage when the document link is hovered over.

